APPAREL merchandising

C5150-7 11/21/83

WHO WILL SCARLETT CHOOSE THIS TIME?

WOMEN SHOPPERS FALL FOR MEN'S UNDERWEAR

WEEKEND CLOTHES: HOTTEST CATEGORY IN MEN'S WEAR

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11 Four belles of southern retailing—Ivey's, Thalhimers, Miller & Rhoads and Belks—are locking horns in Dixie. The object: to become the dominant southern department store. Insiders put Thalhimers and Belks ahead.

14 Weekend wear won't be loafing about in the next year. It's still the fastest-growing men's wear category, with no peak in sight.

16 Knit polo shirts are a wardrobe staple. Men have been shunning emblems in favor of nonemblem shirts, a Gallup survey shows. Symbols like Izod's crocodile and Penney's Fox are maintaining recognition, though.

COVER PHOTOGRAPH BY TED HARDIN

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DEPARTMENTS

19 Short-sleeve dress shirts have become more acceptable to younger men. Retailers are also stocking them for longer seasons to take advantage of men dressing to fit the climate.

21 Surf-influenced young men's wear is sweeping over the East Coast and bubbling up in the Midwest. The looks, epitomized by Hobie and Ocean Pacific, are becoming "status" for young men.

25 Are there no male bastions left? Women want underwear just like men's. Established men's names like Jockey and Calvin Klein are setting the pace in cotton undergarments for women.

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29 To compete with Kids "R" Us, the new off-price children's wear chain, retailers may be forced to keep national brands on sale year-round.

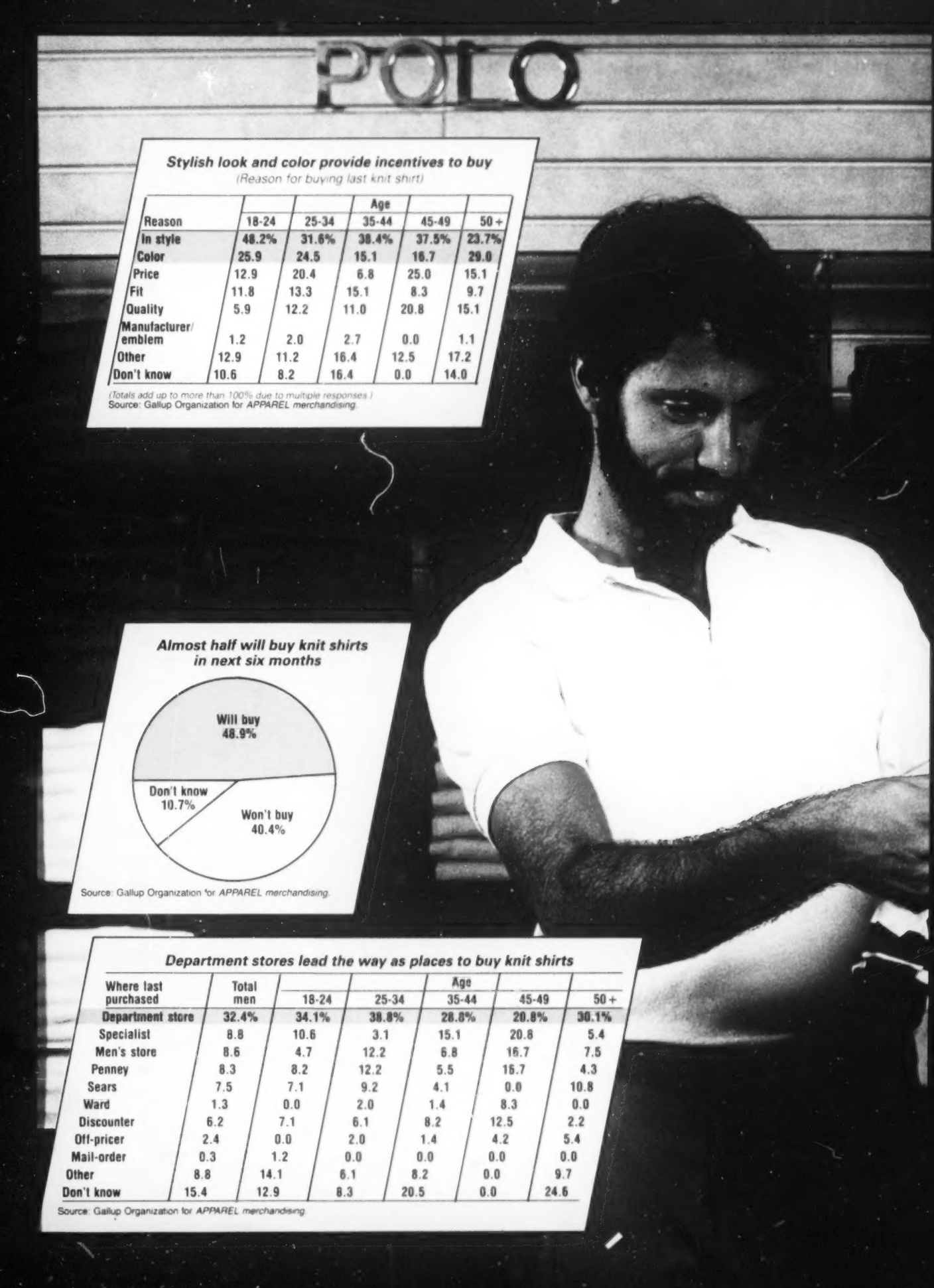
32 Prom dresses are no fashion anachronism in Pittsburgh—not for the Four Seasons boutique, which caters to "special occasions." What's in with teens: soft, feminine, Scarlett O'Hara frocks.

35 Matthew Powell, dmm at Jordan Marsh, studies the beat of young men's wear at the uptrending Boston department store.

37 Sears leads Penney in men's suit sales, scoring gains from January to April 1983.

39 Specialty stores serve career women better, claims Brenda Koskinen, founder of Boston-based Amalia, which counters department stores' larger space with service and expanded assortments for busy women.

40 Oxford Industries' private label division has been going great guns while its branded division, Merona, has been basking in the limelight. Savvy chains and discounters have found they can get attention-drawing collections without the price points of brands.



Stylish look and color provide incentives to buy

(Reason for buying last knit shirt)

Reason	Age 18-24	25-34	35-44	45-49	50+
In style	48.2%	31.6%	38.4%	37.5%	23.7%
Color	25.9	24.5	15.1	16.7	29.0
Price	12.9	20.4	6.8	25.0	15.1
Fit	11.8	13.3	15.1	8.3	9.7
Quality	5.9	12.2	11.0	20.8	15.1
Manufacturer/ emblem	1.2	2.0	2.7	0.0	1.1
Other	12.9	11.2	16.4	12.5	17.2
Don't know	10.6	8.2	16.4	0.0	14.0

(Totals add up to more than 100% due to multiple responses.)
Source: Gallup Organization for *APPAREL merchandising.*

Almost half will buy knit shirts in next six months

Source: Gallup Organization for *APPAREL merchandising.*

Department stores lead the way as places to buy knit shirts

Where last purchased	Total men	Age 18-24	25-34	35-44	45-49	50+
Department store	32.4%	34.1%	38.8%	28.8%	20.8%	30.1%
Specialist	8.8	10.6	3.1	15.1	20.8	5.4
Men's store	8.6	4.7	12.2	6.8	16.7	7.5
Penney	8.3	8.2	12.2	5.5	16.7	4.3
Sears	7.5	7.1	9.2	4.1	0.0	10.8
Ward	1.3	0.0	2.0	1.4	8.3	0.0
Discounter	6.2	7.1	6.1	8.2	12.5	2.2
Off-pricer	2.4	0.0	2.0	1.4	4.2	5.4
Mail-order	0.3	1.2	0.0	0.0	0.0	0.0
Other	8.8	14.1	6.1	8.2	0.0	9.7
Don't know	15.4	12.9	8.3	20.5	0.0	24.6

Source: Gallup Organization for *APPAREL merchandising.*

PHOTOGRAPHED BY STEVE FEEHAN AT LORD & TAYLOR, NEW YORK CITY

Consumer Watch

men's knit shirts

Men's cotton and cotton/poly knit shirts have become a wardrobe staple. And popularity of the casual shirt shows no signs of waning, according to a recent poll conducted by the Gallup Organization for *APPAREL merchandising*.

What do appear to be ebbing in demand, however, are emblems, which have been splashed across more men's chests in recent years than sailors' tattoos. Some 74% of all men surveyed reported owning more knit shirts *without* emblems than with emblems.

Men reported owning an average of nine knit shirts—four with emblems and five without. In addition, almost half of the men surveyed plan to buy more knit shirts, either with or without emblems, in the next six months. Young men, aged 18-24, were most likely to buy, with an overwhelming 63.6% of this age group planning on future knit shirt purchases. Men earning over $25,000 were also more likely than the average man to buy knit shirts (58.1% vs. 48.9%) as men out West, where 57.9% planned to buy in the next six months.

Has the proliferation of emblems in the market dampened the appeal of status logos? Some retailers think so, and are remerchandising accordingly. While knit shirts are continuing strong at the expense of woven shirts, Paul Rogers, men's national fashion director at Sears, sees nonemblem shirts performing better than emblems. As a result, Sears is pruning assortments. "If we had five items that had emblems before," Rogers says, "we've pulled back to two. But we're maintaining the strength of those two and doing the rest in nonemblem."

While others agree that nonemblems are picking up in sales, they feel that it has nothing to do with an antistatus backlash. Rather, it's due to the increasing importance of stripes and other fancy knit shirts, where the emblem is either unnecessary, or detracts from the look of the shirt. Reportedly, Izod plans to double the number of emblemless offerings in spring.

Few industry analysts are ready to write obituaries for emblems entirely. The shakeout appears to be coming for logos that have failed to establish a niche, either status or quality, among consumers. And this trend raises major questions about K mart's recent introduction of its Hunters Glen line, signatured by a horse.

Backlash or not, "the emblem is not the thing that sells the item today," says Bob Horwitz, dmm/men's wear at Minneapolis-based Dayton's. And according to the *Am* survey, men do not shop emblems or manufacturers' names when selecting knit shirts. The most important factor, the survey reveals, is style. More than one-third of the men surveyed cited wanting to be in style as the most important reason for selecting their last knit shirt. Almost half of men aged 18-24, the prime knit shirt shoppers, chose a shirt on the basis of looks. Color is also important, with one-fourth of the men selecting a knit shirt because they liked the color. Price, fit and quality were of little interest to younger men, but men aged 45-49 were more conscious of price and quality than color.

Still, men are aware of certain emblems. When asked to name emblems they were familiar with, 69.2% mentioned Izod's reptile (a crocodile, commonly called an alligator), with more than 8 of 10 men aged 25-34 and earning over $25,000 recognizing the 50-year-old symbol. J. C. Penney's private label Fox was also well-known: one-third of all men named the symbol, as did more than 40% of men aged 25-34, or earning over $25,000 annually. Ralph Lauren's polo pony, Campus' Tiger and Sears' Dragon label fared poorly.

While Izod, the Fox and Polo topped the list of emblems purchased most recently, more men said they bought shirts with no emblems (33.8%) than any single emblem, including Izod (only 27.6% grabbed the reptile). Only among men aged 45-49 did any emblem (Izod, with a 45.8% share) perform better than nonemblem shirts (purchased by only 25%).

Most men purchase knit shirts at department stores, with keystoners capturing about one-third of all knit shirt sales. Men aged 45-49 were torn between shopping at department stores and specialists, with an equal number, 20.8%, shopping at each store type. Of the Big 3 catalog chains, Penney was shopped more often than Sears or Ward for knit shirts, especially among men aged 25-34 and 45-49. *Am*